

SALES ASSISTANT

Harbourfront Wealth Management Inc. is an IIROC registered securities dealer with offices across Canada. As part of the employee owned Harbourfront Group of Companies, the firm specializes in providing complete wealth management solutions for middle to high net worth clients. We are a fast growing, dynamic firm, and are seeking a Sales Assistant to join us.

This opportunity is for a busy Wealth Management Practice located in downtown Vancouver overseeing \$300 million in client assets. The successful candidate will be responsible for providing administrative support through a wide range of activities necessary to ensure the ongoing efficient and effective operation of our fast-paced team.

Job Description:

- Administration and approval of client account openings
- Initiate, lead and support the development of the Executives calendars. Scheduling of meetings, allocation of sufficient preparation time for meetings, recognize and anticipate changes and resolve schedule conflicts.
- Independently respond to client enquiries and escalate to appropriate parties as required based on knowledge of practice/structure and work process
- Review documentation for completeness and accuracy
- Fee based account administration support
- Process client deposits
- Prepare and distribute client welcome packages
- Tracking original client documentation

Required Skills:

- ✓ Registration with IIROC (IR or RR) is preferred but not needed
- ✓ 2+ years of Financial administrative experience
- ✓ Thorough knowledge of various account types
- ✓ In-depth attention to detail
- ✓ Strong written and verbal communication skills
- ✓ Strong computer knowledge (Internet, Word, Excel)
- ✓ Ability to work well under pressure and meet required deadlines
- ✓ Ability to effectively multitask in a fast-paced work environment
- ✓ Effective organizational, decision-making and problem-solving skills
- ✓ Self-starter
- ✓ Positive and friendly attitude



HARBOURFRONT WEALTH MANAGEMENT INC.

Salary will be commensurate with education and experience. Full medical & dental benefits offered to full time employees. If you'd like an excellent opportunity in financial services, please send a cover letter and your resume to: HR@harbourfrontwealth.com

No telephone calls or recruitment agencies please. This posting will remain open until a qualified candidate is hired. We sincerely thank all applicants who express an interest in this role, but wish to let you know that we will only be contacting applicants that are aligned with our requirements.